

GUEST HISTORY:
LOOKUP,
MERGING PROCEDURES,
AND PARAMETERS



Understanding the Basics of Guest History Records

A Guest History record is comprised of four components:

- Folio Detail
- Change Logs
- Guest History ID
- Visit Log

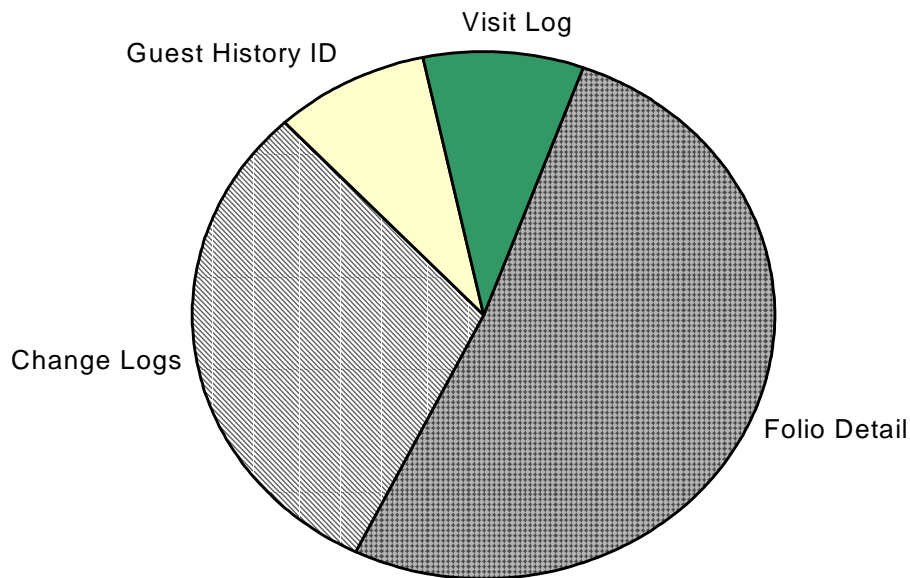
Guest History ID is the portion of the record that contains basic information about the guest like name, address, settlement, etc.

Change logs are the list of all of the modifications and activity done to the account such as room moves, settlement changes, rate overrides, etc.

Folio Detail is the transactions in the guest's folios (a guest can have up to ten guest folios, one group folio and two internal folios) such as room charges, phone calls, payments made, etc.

Visit Detail records all of the individual-stay dates of the guest. There can be an unlimited number of individual stays on one guest history record.

Jane Doe's Guest History Record



The chart above represents one guest history record. In this example, it is for Jane Doe. Different portions of Jane Doe's guest history record take up more memory space than others.

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For example, folio detail takes more memory space to store the information than visit detail does.

Memory space is something to consider when determining what types of records to send to history and how long to maintain them once they are sent. For instance, management may decide not to send cancelled reservations to guest history because of the fear to use up too much space. However, when looking at the pie chart, notice that a cancelled reservation actually takes up very little space. Why? Since a cancelled guest does not have room charges, there is no folio detail to record (folio detail takes up the most space). It is also likely that there is very little change log information since not much would have occurred to the guest's account (and again, change logs take up the next largest amount of space). That only leaves visit detail and history ID, all of which takes up very little space.

Use this same method to determine how long to maintain the account in history. The Geac system allows purging portions of the record individually. This means rather than having to purge the entire record earlier to preserve space, the system can be set up to systematically purge the parts of the record that take up the most space so that the basic information of the record can be maintained longer. For example, folio detail and/or changes logs may be set up to purge after six months, but the history ID may be purged after a year and a half.

Looking Up A Guest In History

1. Press the [Navigator] key
2. Press [S] to select the option Suspend
3. Press the [↓] and highlight Guest History Inquiry
4. Press [Enter] to select that option
5. This opens a Guest History Lookup box. There are many combinations, which can be used to search for a guest. Below is a list of the most common ways as well as some hints and tips.

Windows	Actions	File	Suspend	Utilities	Quick	Help
Guest Inquiry						
Hotel	Room #	Guest Name	Status	Guest Company		
474			STD			
Group	Group Name	Wholesaler	Wholesaler Name	Use Soundex		

- The correct format for entering a guest's name is as follows:
 - Smith, John. This format above is the guest's last name, a comma, a space and the first name
- The more information entered about a guest (i.e. company information or the full guest name), the shorter the list of guests to select from. However, keep in mind that the system is searching for guests who fit all of the requirements entered and entering less gives more information.
- Notice that when pressing [Enter] a "%" is placed after the name. This symbol is a wildcard. It means search for anything. For example, "Smi%" locates Smith, Smithers, Smile and any other name starting with Smi. It can also be used to look up a guest by their first name, should the agent only know that much about them. This is the format to use when searching for a guest by the first name of Stephanie:
 - %, Stephanie%
- Using Soundex can save time. When answering "Y" to this option, the system ignores

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CAPS, symbols and spaces in guest names (i.e. O'Doul or Mac Donald). It also drops consonants and sound out a name providing a list of several spelling variations. For example, the name Paine pulls up Payne, Pain, Pane, etc. Keep in mind that Soundex is not for common use because it pulls up tons of names and of course, that slows down the searching time. Agents should not need to use Soundex in every single search.

- A guest can be searched by the credit card number. Press [Next Block] to go to the next section where that field is located. A guest can not be search by guest name or company AND a credit card. Only one or the other. When searching by card number, the system looks into the Settlement window of the history records and pull up a list of guests with that card number. Note that even if a guest settles their account with a particular card, unless that same card is entered into the Settlement window, the agent is not able to locate the account using that card number.
 - A guest can be searched by entering the Confirmation/Folio number in the Guest Number field. A guest can also be located by entering the club account number.
6. Once the information needed to search for the guest is entered, press the [Execute Query] key. This brings up a list of guests that fit the specified criteria.
 7. Use the [↓] to highlight the desired guest name and press [Enter] to select them.

Viewing and Printing the Guest's Folio From History

1. From the Main Menu, select Guest History Maintenance Menu
2. Select Guest History Record Maintenance
3. Pull up the guest's account using [Enter Query]
4. Press [Quick] and type "FD" to select Folio Data
5. At the Folio field, press [Enter] to view the entire folio
6. To see detailed information about a specific charge, use the [↓] to highlight the desired charge and press [Enter] to select it.
7. Once the detail is viewed, press [Exit] to return to the main folio.
8. To print the folio, press [Actions] and type which folios to print:
 - GST – Prints all guest folios A, B, D-K
 - ALL – Prints all folios, including non-guest such as C
 - ENTER A LETTER – Or simply type the letter of the specific folio to print. W and Z folios can not be printed, nor can a folio that has no activity on it.
9. Press [Save]
10. Press [Exit] to print the folios.

Merging Guest History Accounts

Merging guest records is an easy process to do as long as it is kept clean and done often. Agents may add and save merge information in the Merge Entry screen and after all agents are done run the Post Merge process just once. Keeping it clean could be easier if each agent is responsible for one letter of the alphabet.

1. From the Main Menu, select Guest History Maintenance Menu
2. Select Guest History Report Menu
3. Print the Guest History Pre-Merge Report.
4. Using the Guest History Pre-Merge Report, decide which guest numbers are to be merged into other records.
5. [Exit] back to the Guest History Menu.
6. Select Guest History Merge. In this screen, using the Guest History Pre-Merge report, type in all the guest numbers to merge.

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Year 2000 US Hotel	Guest History Merge Entry	Date: 04-MAR-2000 SAT	
Blanca Quintanilla		Time: 01:39 AM	
From GHID		To GHID	
10039374	Brown, Melanie	12844	Brown, Melanie

Note: When pressing [Save] in this screen, the system simply holds the information until the merge process runs. When getting messages that a certain number can not be merged because it has already been used, another agent could have entered it already and did not run the last process. Properties doing this for the first time or who have setup this screen but did not run the merge process may have records waiting to merge that the agent can not see. The more records merged at one time, the longer the process takes. To check for existing entries use [Enter Query] and type "N".

7. Go back to Guest History Reports and run the Guest History Post Merge. This is the final process that actually sets the account to be merged. Check how many records are merging by using the [Enter Query], to be sure that there is enough the time on that terminal to complete the process. The process is only lengthy when merging 150 or more records at one time.
8. The merging process is part of the guest history purging process, which runs in the night audit. Until the purge process runs, nothing actually merges. The date the purge process is set to run can be viewed, and if need be changed. From the Guest History Menu, select Guest History Parameters and [Quick] into the Purge Parameters window. The Next Purge Date field displays the next time the purge process is scheduled to run. This date can be modified if the purge needs to happen sooner than the displayed date.

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Guest History Reports

Alpha List

This report displays guest record information. It is used to keep guest history clean.

Process Code: ghalpha

Yr 2000 Hotel-US-472		Guest History Alpha Report				Page Number: 1	
Blanca Quintanilla		Order By Name				04-FEB-2000 01:38 PM	
(gh.ghalpha)		For All Records					
Guest Name	Address 1	Address 2	City	Stat	Post Code	Company	Last Vist Spec Serv
Adults, Wrong	123 Wholesaler Highw		San Dimas CA	91773			28-JAN-00
Ball,kick	123 Wholesaler Highw		San Dimas CA	91773			26-JAN-00
Bar, Handle	123 Wholesaler Highw		San Dimas CA	91773			28-JAN-00
Bear, Fuzzy	123 Wholesaler Highw		San Dimas CA	91773			29-JAN-00
Brender, Austin	15621 Highland		Riverside CA	91624			06-FEB-96
Cap, Pen	123 Wholesaler Highw		San Dimas CA	91773			28-JAN-00
Chair, Electic	123 Wholesaler Highw		San Dimas CA	91773			28-JAN-00
Computer, Laptop	123 Wholesaler Highw		San Dimas CA	91773			28-JAN-00
Cord, Power	123 Wholesaler Highw		San Dimas CA	91773			28-JAN-00
Cup, Coffee	123 Wholesaler Highw		San Dimas CA	91773			28-JAN-00
Ellenman, Bob	26302 Via Linda Rd		Los AlisosCA	92691			13-JAN-96
Enderle, Dale	33 W. Quebec #23		Denver CO	83325			25-JAN-00
Error, Override	123 Wholesaler Highw		San Dimas CA	91773			27-JAN-00
Game, Baseball	123 Wholesaler Highw		San Dimas CA	91773			26-JAN-00

Prompts available for this report:

- ⇒ Last Name From
- ⇒ Last Name To
- ⇒ Postal Code From
- ⇒ Postal Code To
- ⇒ First Visit From
- ⇒ First Visit To
- ⇒ All Records?
- ⇒ Minimum Visit
- ⇒ Maximum Visit
- ⇒ Region Code
- ⇒ Country Code
- ⇒ Rate Schedule
- ⇒ IATA
- ⇒ Club
- ⇒ Sort Order
- ⇒ Market Segment
- ⇒ Source Code
- ⇒ CFT
- ⇒ Group Code
- ⇒ Special Service
- ⇒ VIP

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Guest History Match

This report lists any possible guest record matches for reservations within a specified arrival date range.

Process Code: ghmatch

```
Year 2000 Hotel-US Format      Guest History Match Report      Page Number:      1
Blanca Quintanilla           For arrival dates between 02-04-2000 and 03-05-2000      04-FEB-2000 01:52 PM
(res.ghmatch)                 Including Group Delegates and Including Travel Agent reservations
                              Including Guest Name, Address, Credit Card, Club 1, Club 2 Matches
                              Including GH stays within 999 days
                              Order by Guest Name
```

```
Guest or GH Number & Name/
Credit Card Info./          Company Name/ Club Account 1/ Club
Extra Information           CC Exp Date  Club Account 2  Exp Date Guest Address
-----
```

```
7124477 Steppes, Mike
AX 373235387881007          01-01
Arrives: 02-04-2000 Departs: 02-06-2000 Nights: 2
```

----- Possible GH matches -----

```
6509 Bernstein, Mich          AA 123456789 12-99 9 So. Bruce, Anaheim, CA, 92804, USA
AMEX 373235387881007          12-97 SPG dawn 12-99
Last Visit: 03-28-1997 Total Visits: 11 Total Nights: 335
```

Prompt available for this report:

- ⇒ Start Date
- ⇒ End Date
- ⇒ Include GH Stays Within XXX days
- ⇒ Exclude Guests with Group Code:
- ⇒ Exclude Guests with T/A?
- ⇒ Include Guest Name?
- ⇒ Include Guest Address?
- ⇒ Include Credit Card?
- ⇒ Include Club 1?
- ⇒ Include Club 2?
- ⇒ Sort Order

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Guest History Pre-Merge

This report prints a summary of guest history records on a specified letter range. This report is used to verify guests with more than one record for the merging process.

Process Code: premerge

Yr 2000 Hotel-US-472		Guest History Pre-Merge Report				Page Number: 1	
Blanca Quintanilla						04-FEB-2000 02:01 PM	
(gh.premerge)		From letter A to Z					
GHID	Last Stay	Room Nights	No. Visits	Guest Name	Company Name	Guest Address	
10040597	01-28-2000	0	1	Adults, Wrong	Mr	123 Wholesaler Highway, San Dimas	
10040581	01-26-2000	2	1	Ball,kick	Mr	123 Wholesaler Highway, San Dimas	
10040585	01-28-2000	0	1	Bar, Handle	Mr	123 Wholesaler Highway, San Dimas	
10040610	01-29-2000	0	1	Bear, Fuzzy	Mr	123 Wholesaler Highway, San Dimas	
10194	02-06-1996	0	1	Brender, Austin	Mr	15621 Highland, Riverside	
10040611	01-28-2000	0	1	Cap, Pen	Mr	123 Wholesaler Highway, San Dimas	
10040614	01-28-2000	0	1	Chair, Electic	Mr	123 Wholesaler Highway, San Dimas	
10040617	01-28-2000	0	1	Computer, Laptop	Mrs	123 Wholesaler Highway, San Dimas	
10040606	01-28-2000	0	1	Cord, Power	Mrs	123 Wholesaler Highway, San Dimas	
10040587	01-28-2000	0	1	Cup, Coffee	Mr	123 Wholesaler Highway, San Dimas	
10070	01-13-1996	0	1	Ellenman, Bob	Mr	26302 Via Linda Rd,Los Alisos	
10040583	01-25-2000	3	1	Enderle, Dale		33 W. Quebec #23, Denver	
10040599	01-27-2000	0	1	Error, Override	Mr	123 Wholesaler Highway, San Dimas	
10040582	01-26-2000	2	1	Game, Baseball	Mrs	123 Wholesaler Highway, San Dimas	

Prompts available for this report:

- ⇒ Group Name
- ⇒ Company Name
- ⇒ Market Segment
- ⇒ Start at Letter
- ⇒ End at Letter
- ⇒ Start at Name
- ⇒ End at Name

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Guest History Post Merge

This report shows all records merged by the user. It is used as a backup record.

Process Code: postmerge

Yr 2000 Hotel-US-472	Guest History Post Merge Report	Page Number: 1
Blanca Quintanilla		04-FEB-2000 02:17 PM
(gh.postmerge)		

*** This Record ***		Merged With	*** This Record ***	
GHID	Guest Name		GHID	Guest Name
2814	Ms. Abtin, Karla		2812	Ms. Abtin, Karla
101071	Aikman, Troy		2836	Aikman, Troy

End of Report

Prompts available for this report:

⇒ None

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Guest History Profile

This report displays guest records with all main record information.

Process Code: ghprof

Yr 2000 Hotel-US-472		Guest History Profile Report				Page Number: 1	
Blanca Quintanilla		For Guest History Records				04-FEB-2000 02:31 PM	
(gh.ghprof)		Ordered By Name					
Guest History ID: 10040597		First Visit	28-JAN-00	Hotel	472	Average Nights	0
Armstrong, Loui		Last Visit	28-JAN-00	Hotel	472	Average Revenue	0.00
123 Wholesaler Highway		Total Visits	1	Nights	2	Market Segment	50
		Total Revenue	126.00			Source	TRAV
San Dimas CA 91773		Total Room	101.30	Company		Region	SOWT
USA		Total Food	10.00	Club 1		VIP Code	
		Total Beverage	14.70	Club 2		Comp Code	
Home (659)569-8632		Total Misc	0.00	Passport	123698547	Misc Stat 1	
Work (569-369-9865		Total Other	0.00	Birth Date	11/22/65	Misc Stat 2	
Hotel Arrive/Rate	Room Room	Persons	Room Rt/Whs	Name/	Set/	Mkt/	VIP/
NumberDepart	Schedule	Type	Number	Ad Yt Ch	Tour	Code	Comp
472	28-JAN-00 STD	PDDS	135	1 0 3		49.75	CA
	30-JAN-00				Domestic Cor		TRAV SOWT
							50
							126.00

Prompts available for this report:

- ⇒ Print 1 record per page (Y/N)
- ⇒ Expected Arrival, Registered, History
- ⇒ Guest Number
- ⇒ Arrival Date
- ⇒ Sort Order
- ⇒ All Guest History Record
- ⇒ Guest History ID
- ⇒ Last Name From/To
- ⇒ Postal Code From/To
- ⇒ First Visit From/To
- ⇒ Last Visit From/To
- ⇒ Minimum Visits
- ⇒ Maximum Visits
- ⇒ Region
- ⇒ Country
- ⇒ Special Service
- ⇒ VIP
- ⇒ Club
- ⇒ Tour
- ⇒ Market Segment
- ⇒ Stat1/2
- ⇒ Group
- ⇒ IATA
- ⇒ Source
- ⇒ Wholesaler
- ⇒ CFT
- ⇒ Rate Schedule

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Guest History Pre-Purge

This report displays all records due for deletion in the next purge process. It also gives the users the ability to change the status of the record to prevent it from being purged.

Process Code: ghpreprg

Year 2000 US Hotel Blanca Quintanilla (gh.ghpreprg)	Guest History Pre-Purge Report Detail	Page Number: 1 03-MAR-2000 05:03 AM				
The following Guest History records will be purged in the next purge cycle:						
GH ID	Name	Last Visit (Months)	Total Visits	Arrive	Depart	Revenue
10039374	Brown, Melanie	(0.00)	0			
11232	Poskey, William	04-28-1997 (34.67)	1	04-28-1997	04-28-1997	0.00
Number of Guest History records will be purged:			2			

Prompts available for this report:

⇒ Print Report in Summary or Detail (S/D)?